

Kansas AG SUMMIT

GROW SMARTER. GROW STRONGER. GROW KANSAS.

2016 Kansas Governor's Summit on Agricultural Growth
August 30, 2016 • Manhattan Conference Center

MORNING AGENDA

8:00-8:30 Registration and Networking

8:30-9:00 Welcome (Governor Sam Brownback and Secretary of Agriculture Jackie McClaskey)

9:05-10:05 Sector Breakouts • Session 1

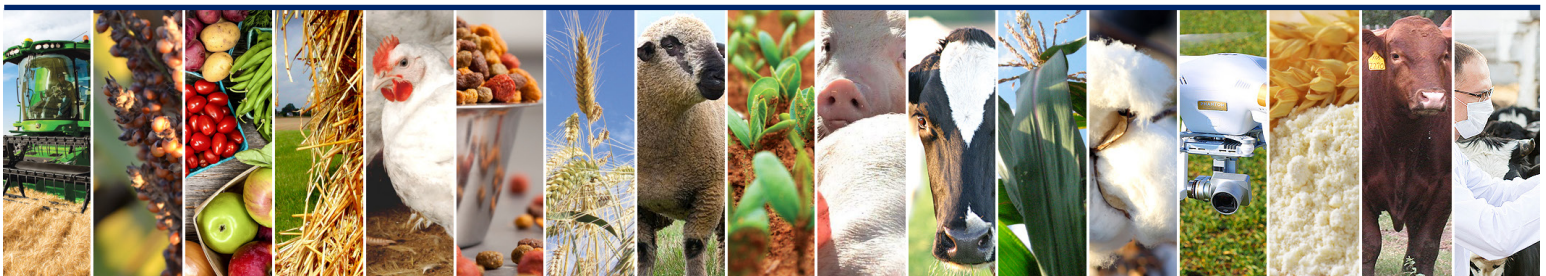
Room A (McDowell) - Animal Health
Room B (Tuttle) - Wheat
Room C (Alcove) - UAS
Room F (Flint Hills) - Pork
Room G (Kings) - Specialty Livestock
Room H (Konza Prairie) - Cotton

10:15-11:15 Sector Breakouts • Session 2

Room A (McDowell) - Beef
Room B (Tuttle) - Specialty Crops
Room C (Alcove) - Sorghum
Room F (Flint Hills) - Dairy
Room G (Kings) - Pet Food
Room H (Konza Prairie) - Soybeans & Other Oilseeds

11:20-12:20 Sector Breakouts • Session 3

Room A (McDowell) - Beef
Room B (Tuttle) - Food Processing
Room C (Alcove) - Equipment & Technology
Room F (Flint Hills) - Corn
Room G (Kings) - Feed & Forage
Room H (Konza Prairie) - Poultry



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AFTERNOON AGENDA

12:25 Lunch

12:50-1:50 Talent & Workforce: Their Needs & Our Needs

1:55-2:45 Round 1 of Crossover Topics

Room A (McDowell) - Water & Natural Resources

Room B (Tuttle) - Consumer Awareness and Community Acceptance

Room C (Alcove) - Global Opportunities

Room F (Flint Hills) - Workforce

Room G (Kings) - Transportation & Logistics

Room H (Konza Prairie) - Barriers to Entry

2:55-3:45 Round 2 of Crossover Topics

Room A (McDowell) - Water & Natural Resources

Room B (Tuttle) - Consumer Awareness and Community Acceptance

Room C (Alcove) - Global Opportunities

Room F (Flint Hills) - Workforce

Room G (Kings) - Transportation & Logistics

Room H (Konza Prairie) - Barriers to Entry

3:55-4:45 Wrap-Up

4:45-6:00 Social





Sector Breakout Summaries

Animal Health

Kansas is a leader within the world's largest concentration of public and private entities in animal health and nutrition, the KC Animal Health Corridor. As the global population continues climbing and demand for animal-based protein increases, the animal health sector will play an important role in raising healthy animals, and Kansas has potential to be an important animal health hub.

Beef

The beef cattle sector has been and continues to be the single largest sector in the Kansas agriculture industry. In addition to managing volatile markets, consumer demand, regulatory challenges and weather extremes, the Kansas beef community will work to grow its role as a trusted leader throughout the beef production community. (This workshop will occur twice during the morning sessions.)

Corn

The corn sector of the Kansas agriculture economy includes the production of corn and the first purchaser uses of that corn such as livestock feeders, ethanol plants and exporters. Opportunities related to improving soil health, targeted pesticide use and application technologies, trait technologies, improvements in irrigation technologies, and more will help increase production capabilities in Kansas.

Cotton

Cotton production and ginning in Kansas have exceeded 1.1 million bales since 1996. Infrastructure investments in the cotton industry have helped establish four gins in Kansas. An opportunity exists to incorporate more cotton production into a traditional crop-rotation cycle as a means to add a high-value crop that has lower water requirements compared to other crops.

Dairy

In 2015 Kansas was home to 143,000 dairy cows that produced more than 3.1 billion pounds of milk, and Kansas continues to be one of the fastest-growing regions for dairy production nationwide, as milk processing capacity continues to grow. Abundant land, feed supply, ideal climate, proactive water policies and a positive business environment give Kansas the opportunity to be a leader in dairy production and milk processing.

Equipment and Technology

Kansas is home to agricultural equipment and technology companies in a broad range of sizes and specializations. Pairing the prevalence of the agricultural industry with Kansas's pro-business climate and Midwest values makes Kansas a prime location for entrepreneurs and established businesses alike to create or expand.

Feed and Forage

Forage production plays a critical role in the state's agricultural industry, providing Kansas livestock producers with hay, silage, and grazing sources from multiple diverse plant species. Advancements in plant genetics and irrigation technologies, growth in livestock production in Kansas, land availability and expanded access to foreign hay and alfalfa markets provide opportunities for growth in forage production in Kansas.

Food Processing

Kansas is home to large-scale food processors as well as small, locally owned processors. Central location and freight options create a logistics advantage for Kansas to not only add value to those commodities produced in the state, but for products that are shipped in from other states for further processing before moving on to their next destination.

Pet Food

The pet food industry is growing rapidly in Kansas. This business growth will develop into a larger market of value-added products from the resources available in Kansas. With the growing trend of pet ownership, the pet food industry is poised for additional growth. This business growth will develop into a larger market of value-added products from the resources available in Kansas.

Pork

The pork industry provides pork products locally, nationally and internationally. Modern swine production has become very specialized, with growth occurring primarily in the central and western regions of Kansas. Based on current industry trends, opportunities may exist for increased value-added processing, or large-scale pork processing, and increased swine production by identifying a specific niche within the production chain.

Poultry

While considered relatively small compared to other species of livestock production, Kansas is home to innovative and high-value egg laying and poultry genetic companies. Abundant feedstock supplies and land availability paired with a relatively small number of poultry operations makes Kansas an attractive choice to poultry farms looking to grow or expand.

Sorghum

Kansas leads the nation in grain sorghum production which is a versatile, efficient, multiuse crop well suited for Kansas agriculture. While sorghum has historically been used for livestock feed, ethanol production and exports, it is gaining popularity as a food and pet food product. In addition to improved production capabilities in Kansas, there are also opportunities for increased processing of sorghum for ethanol and food ingredients.

Soybeans and Other Oilseeds

The oilseed sector in Kansas includes soybean, sunflower and canola production as well as the first purchaser uses of the oilseeds, including crushers, refiners and biodiesel manufacturers, and feed stream users. Advancements in soybean and canola make oilseeds more viable on more acres of dryland in Kansas, and opportunities exist related to biodiesel production, additional processing, such as soymilk, and livestock feeding.

Specialty Crops

Kansas is well positioned to grow a variety of specialty crops and increasing consumer interest in local food systems is bringing attention to the specialty crop industry. Based on current industry trends and results of an ongoing Statewide Survey of Specialty Crop Production, tools to encourage growth, increase competitiveness and identify marketing outlets for the specialty crop industry in Kansas will be identified and prioritized.



Sector Breakout Summaries (cont'd)

Specialty Livestock

In addition to more traditional livestock, Kansas is also home to other species, including goats, sheep, bison, alpaca, llamas and more. In addition to opportunities to expand production of specialty livestock species in Kansas, there also exists potential to capitalize on consumer demand growth local products through increased small-scale processing capacity for specialty livestock.

Unmanned Aerial Systems

A growing sector within agriculture is unmanned aerial systems (UAS) as farmers and ranchers work to implement precision technologies into their management practices. As a leader in both agriculture and aviation, Kansas can promote and support future aviation technology. Opportunities exist to not only expand use and production of UAS technologies but also to be an education and training hub for this growing sector.

Wheat

Known as the "Wheat State," Kansas is not only the nation's leading wheat producer, but also ranks first in flour milling capacity in the United States and is a recognized knowledge-base in the global industry. While Kansas is the world's best source for hard red wheat, opportunities exist with new hard white wheat varieties as well as through expanded international trade and further value-added processing.

Crossover Topics

Barriers to Entry

From accessing the capital necessary to get started or to expand in agriculture, identifying the next generation of ownership for existing operations, addressing statutory roadblocks related to who can own agricultural operations in Kansas, and more, numerous challenges make it difficult, if not impossible, for growth to occur. Identifying solutions to these challenges will be critical to future growth of Kansas agriculture.

Consumer Awareness and Community Acceptance

Now, more than ever before, consumers are interested in how and where their food is produced. As we work to grow the agricultural industry, it will be important to work alongside Kansas communities to provide accurate information regarding modern production agriculture and prevent misconceptions from blocking growth opportunities. Identifying solutions to these challenges is key to establishing a trusting relationship with consumers and a welcoming environment for a growing and robust Kansas agricultural industry.

Global Opportunities

With more than 99 percent of global consumers residing outside Kansas, growth in the state's agricultural industry relies on the ability to access and compete in the global marketplace. Global demand for food and agricultural products from Kansas will continue to grow, and it will be important for Kansas farmers, ranchers and agribusinesses to take advantage of programs and services aimed at providing assistance in opening new markets and gaining new international customers.

Transportation and Logistics

Safely and efficiently moving agricultural products relies on a robust and modern transportation system. Kansas ranks third nationally in total road mileage and has nearly 4,800 miles of track providing critical rail services. Opportunities exist to improve existing infrastructure but also to develop systems and infrastructure to enhance transportation capabilities to improve efficiency and competitiveness of Kansas agriculture.

Water and Natural Resources

Water and the Kansas economy are directly linked, and providing farmers, ranchers and agribusinesses with tools and flexibility to better manage their water resources will be critical to future growth of Kansas agriculture. In recent years, flexible tools have been developed to encourage water conservation and management. There also exists the need to continuously improve the regulatory environment in Kansas to ensure rules are fair and adequate and that water-users' needs are met in a timely fashion.

Workforce

Job opportunities in food, agriculture, renewable natural resources, or the environment will outpace the number of individuals with the education and skills necessary for the positions in the next five years. In addition to having access to a sufficient number of labors and skilled workers, agricultural employees also face challenges related to the need for training, and leadership development and management programs, as well as meeting quality of life and community services necessary to recruit and retain good talent.

